

PERSI ANSWER CENTER CELEBRATES ANNIVERSARY

It's hard to believe the PERSI Answer Center (PAC) has been operational for a year. It was last September when PERSI rolled out the first phase of its multi-phased reorganization project. Since then, PAC has undergone many changes. PERSI is pleased to share a few highlights with you.

The Contact Center

New and existing staff have come together as a team to provide phone support to members:

Judy Aitken: PAC Manager. Judy has 13 years with PERSI and 40 years of state service. She has extensive knowledge of Idaho Code, PERSI operations, and the pension issues important to employers, members, and retirees.

Kimberlee Hall: PAC supervisor. Kim came to PERSI in April after spending 16 years with First Health in customer service and call center operations. She brings not only many years of experience, but also strong leadership and a good sense of humor to her role.

Denice Desilet: Formerly PERSI's receptionist, Denice's experience dealing with people, coupled with her easy-going personality and an eagerness to learn, made her a perfect fit for PAC.

Alicia Harper: Has been with PERSI nearly a year. She has more than 10 years' customer service and call center experience. Besides educating herself on PERSI, she is working on her bachelor's degree.

Stacey Hoffman: Came to PERSI last September from Health and Welfare where she developed her keen customer service skills.

Kattianna Rouse: The newest member of the PAC, with only a few weeks under her belt, Katt brings a fresh perspective and 12 years of customer service experience to her PAC role.

Gerry Sjol: As a long-time PERSI employee, Gerry is a seasoned pro when it comes to customer service. She has the patience, understanding, and knowledge to effectively handle member calls.

Preparing to Answer Questions

With the goal of having the contact center staff answer 90 percent of caller questions without transferring calls to someone else, PERSI focused on ways to turn an existing group of subject matter experts (specialists) into generalists with a wider knowledge of PERSI benefits. To assist with this effort, PERSI formed an education work team to identify needs and begin developing training modules. By setting up the PAC team for success using a comprehensive training program, PERSI expects members to get accurate and timely information from knowledgeable and courteous staff.

Before PAC became operational, the entire team underwent several weeks of training so they would be ready to answer member questions. The training covered everything from retirement options, deaths, and disability to sick leave, separations, and divorce. Throughout the training, the goal remained the same: get the team to a point where they could answer most questions or respond to inquiries without placing a caller on hold, transferring or passing them around, or asking them to call back.

The training also included usage of PERSI's Online Guideline, a repository for the terminology, policies, practices, and procedures relating to PERSI benefits. It also includes Idaho law regulating the way the system operates. Technical writer Larry Sweat is currently modifying the guide to keep it user-friendly and up-to-date. Because the guide makes information readily available, anyone in PAC who gets stumped by a question can usually still provide an answer within a matter of seconds with just

a few strokes on their computer keyboard. This handy online tool ensures PERSI provides quick, consistent, and accurate information to every caller.

"Just because callers are served so quickly, it doesn't mean the work ends there," notes Judy. "Since there's generally research and paperwork associated with each inquiry or request, the majority of PAC's work takes place after the call ends." During down (non-phone) time, PAC does paperwork or tries to locate current mailing information on members whose mail has been returned to PERSI.

New Phone System

Anticipating an increase in phone calls as baby boomers begin to retire, PERSI is installing a new phone system to automatically route incoming calls to all three PERSI offices (Boise, Pocatello, and Coeur d'Alene). The routing will be seamless to callers. Besides the PAC staff in Boise, Lynne Yowell will be answering caller questions out of the Pocatello office and Kathi Kaufman will be taking on the task in Coeur d'Alene. Both have been with PERSI for several years and, as members of the PAC team, they have completed the same training as their Boise counterparts. "Employers should know anyone in PAC can assist their employees," explains Kim. "Members don't need to talk to the same person every time to get the right answer," adds Judy.

Tracking Trends

Since its inception, PAC has taken approximately 43,000 calls – an average of 825 calls per week. PERSI tracks the incoming calls and uses monthly statistics to measure its effectiveness. At a glance, Kim can see how many calls were received, how many were answered, how many were abandoned, the percent of abandoned calls, and the overall level of service. This data is then used to track trends.

For example, May 2006 had the highest number of calls, while January 2006 had the lowest. Based on this type of information, PERSI is in a better position to plan phone coverage and gauge its staffing needs.

Retirement Specialists

The PAC also includes Retirement Specialists in Boise (Catherine Atchison, Lisa Conn, Melody Hodges), Pocatello (Roger Bartlett, Lisa Mabe), and Coeur d'Alene (Kari Caven). These folks meet with members to discuss specific retirement issues and to help complete the paperwork necessary to ensure a smooth transition from work to retirement.

This summer, PERSI realized the Retirement Specialists were an untapped resource. So in June, these experts began splitting their time between member appointments and PERSI's member education program. With their extensive knowledge, it made sense to have the Retirement Specialists more involved with the retirement workshops. To help them succeed as educators, they all recently participated in a 2-day *Train the Trainer* workshop to hone their training skills.

As PAC enters its second year of operation, Kim is optimistic about the direction the team is going. "Everyone is not only rising to the challenges put in front of them by PERSI, but they've also repeatedly shown they are not afraid to step out of their comfort zone to take on new responsibilities. I'm proud to work with this caliber of people," she says. Judy adds, "Kim has been a wonderful addition to PERSI, and has played a big part in PAC's success."



Kimberlee Hall

Notes

PERSI Answer Center Manager [Judy Aitken](#) celebrated 40 years of service to the State of Idaho.

PERSI Executive Director [Alan Winkle](#), Deputy Director [Don Drum](#), and Answer Center Manager [Judy Aitken](#) attended the National Association of State Retirement Administrators conference in San Diego the first week of August. In addition to networking among their peers, the trio heard presentations on a variety of subjects including investment management, world events impacting the pension industry, actuarial, data processing, health care, and significant happenings in each of the states and territories.